

## **ACCOUNT MAINTENANCE**

1. Contributes to customer retention by strengthening relationships through account management and maintenance.
2. Serves customers by completing enrollments and conversion mailings, responding to requests, resolving complaints, and maintaining quality service.
3. Prepares work to be processed by gathering, sorting, organizing, and recording data, information, and documents.
4. Completes enrollments by analyzing and auditing documents, tapes, and transmissions, and researching and resolving processing problems.
5. Completes conversion mailings by coordinating requirements and developing plans.
6. Provides information by collecting, analyzing, and summarizing data, and responding to requests.
7. Resolves complaints by investigating issues and composing responses, referring non-standard complaints and potential lawsuits to legal or government affairs departments.
8. Contacts prospective clients and maintains regular communication with existing accounts.
9. Prepares reports, bids, and contracts by collecting and analyzing information.
10. Employs research and data-gathering skills to prepare pricing models, proposals, and presentations.